1329.0 - Australian Wine and Grape Industry, 2002

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Summary

Main Features

MAIN FEATURES

INTRODUCTION

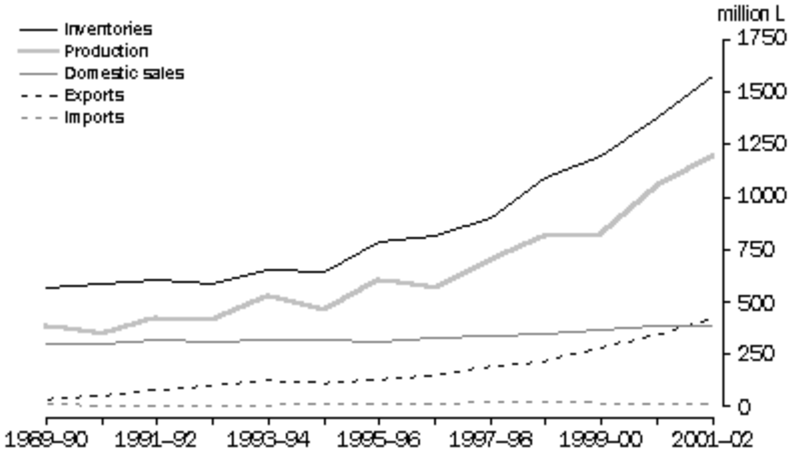
Throughout 2001-02 favourable seasonal conditions were generally experienced which assisted the continued strong performance of the Australian wine and grape industry. For the fifth consecutive year record levels were achieved for all the major grape-growing and winemaking indicators in the table below. Exports of Australian produced wine were a major highlight, exceeding 400 million litres in volume and $2,000 million in value for the first time. Domestic sales of Australian produced wine recorded a slight increase on 2000-01 and were exceeded for the first time by wine exports.

WINE AND GRAPE INDUSTRY, Statistical summary - 2001-02

		% Change from 2000-01
Area of bearing vines (ha)	143,373	9.8
Total grape production (t)	1,753,888	13.4
Fresh grapes crushed (t)	1,605,846	12.8
Beverage wine production (million L)	1,195.2	13.5
Beverage wine inventories (million L)	1,570.1	14.0
Domestic sales of Australian wine (million L)	385.3	0.1
Domestic sales value of Australian wine ($m)	1,946.3	6.3
Exports of Australian wine (million L)	418.4	23.7
Exports of Australian wine ($m)	2,105.2	20.2
Imports of wine (million L)	14.5	13.4
Imports of wine ($m)	115.6	25.3

Source: Sales of Australian Wine and Brandy by Winemakers (cat. no. 8504.0); ABS data available on request, Wine Statistics Survey, 2001-02; Wine and Spirit Production Survey, 2001-02; Inventories of Australian Wine and Brandy 2001-02; Vineyards Survey, 2002.

BEVERAGE WINE TRADE



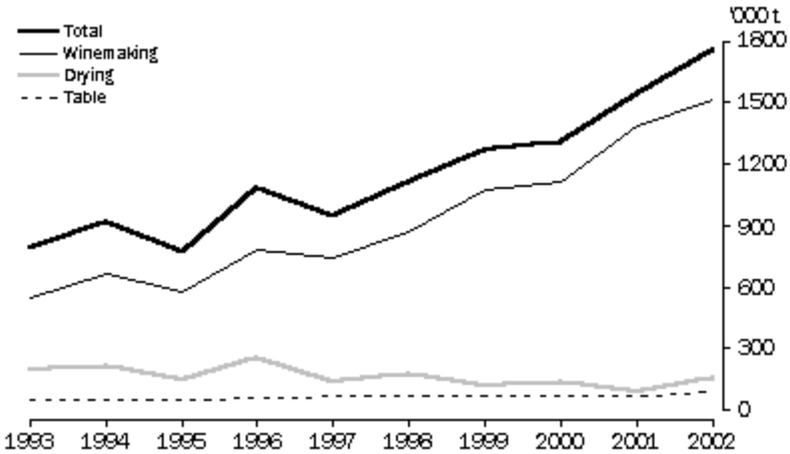
Source: Sales of Australian Wine and Brandy by Winemakers (Cat. no. 8504.0); ABS data available on request, Wine Statistics Survey; Wine and Spirit Production Survey, Inventories of Australian Wine and Brandy Survey.

VITICULTURE

Estimates from the Vineyards 2002 collection show that the season 2002 was another record year for Australia's grape growers, with 158,594 hectares of vines being cultivated. The total area of vines bearing grapes increased by 10% to 143,373 hectares while the total area of vines currently not bearing grapes decreased by 14% to 15,221 hectares.

There was a record 1,753,888 tonnes of grapes harvested in 2002, a 13% increase on the 2001 harvest. Red grape varieties comprised 61% of both the total area of vines and the total bearing area. For the second consecutive year red grape production (893,131 tonnes) surpassed white grape production (860,757 tonnes), reinforcing shifts in consumer preferences. A record 1,514,501 tonnes of grapes were harvested for winemaking, an increase of 9% over the previous year's harvest. The production of grapes for drying rose by 69% to 152,863 tonnes while the harvest of table and other grapes also rose, by 34% to 86,524 tonnes.

GRAPE PRODUCTION AND INTENDED USAGE



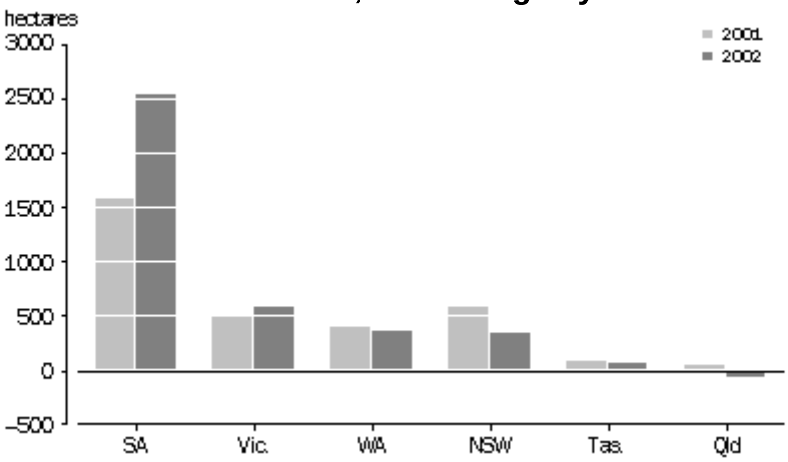
Source: ABS data available on request, Vineyards Survey.

The net increase in area planted under vines for 2001–02 (derived from vines planted and vines lost during the year) was 3,890 hectares, an increase of 21% from the 2000–01 figure of 3,221 hectares. Gains occurred in both the red grape and white grape varieties with red grapes gaining 2,399 hectares and white grapes gaining 1,491 hectares. For red grape

varieties the highest gain in area was recorded for Shiraz with an additional 1,156 hectares, which represents 48% of the total gain in area of red grapes. This was followed by Cabernet Sauvignon with 519 hectares (22%). The net gain in area of white varieties (1,491) was almost totally driven by an additional 1,495 hectares of Chardonnay which offset net losses in area of other white varieties. The largest net change in area occurred in South Australia (SA) where 2,543 hectares (65% of the total) were gained. This represented a gain in red varieties of 1,690 hectares (66%) and a gain in white varieties of 854 hectares (34%).

South Australia remains the principal red grape-growing State with 51% of total red grape production and 53% of the red grapes used for winemaking. Victoria (Vic.) produced 38% of all white grapes followed by New South Wales (NSW) with 29% of the total white grapes produced in 2002. Queensland (Qld) (12,375 tonnes) recorded a 65% increase in total grape production while Tasmania (Tas.) (3,148 tonnes) was the only state to record a decrease (37%), despite a 34% increase in bearing area. The three largest wine-grape producing zones (as defined in the Australian Geographical Indications, refer to note 9 of the Explanatory Notes) contributed 68% of the total wine-grape production. These zones, as in 2001 are, the Lower Murray zone of South Australia (419,719 tonnes), the Big Rivers zone of New South Wales (321,809 tonnes) and the North West Victoria zone (282,734 tonnes).

VINE PLANTING, Net Change by State



Source: ABS data available on request, Vineyards Survey.

STRUCTURE OF THE WINE AND GRAPE PRODUCTION INDUSTRIES

For the 2002 vintage there were 398 locations around Australia (Aust.) which crushed 50 tonnes or more of grapes owned by 350 winemaking businesses, compared with the 2001 vintage which had 351 locations owned by 306 winemaking businesses. Almost one-third of all locations are in South Australia and these accounted for 46.5% of the Australian wine grape crush. Victoria had 22.1% of the total number of locations with 14.7% of the total wine crush, while New South Wales/Australian Capital Territory (ACT) also had 22.1% of all locations but with 34.6% of all grapes crushed and Western Australia (WA) had 19.6% of locations with 3.9% of the crush.

The 350 winemaking businesses are diverse in size, with 198 of these businesses crushing 50–400 tonnes, having a combined crush of 31,806 tonnes (2.0%), while 152 businesses crushing more than 400 tonnes crushed a total of 1,574,040 tonnes (98.0%) of grapes. Compared with the 2001 vintage the number of businesses crushing 50–400 tonnes increased by 22.2% and their quantity of grapes crushed rose by 18.1%. Those crushing more than 400 tonnes increased by 5.6% in number and 12.7% in the quantity of grapes crushed. The 138 smallest businesses crushed less than 1% of all grapes and averaged 106 tonnes each, while the 13 largest businesses crushed 71.9% of all grapes and

averaged 88,850 tonnes each.

An alternative view of the wine manufacturing industry, together with the grape-growing industry is available from the 2001 Census of Population and Housing. It identified 14,480 persons whose main job was in the manufacturing or blending of wine and 15,629 persons whose main job was in grape-growing. This excludes casual workers such as grape pickers and other seasonal workers not working in those industries in the week prior to the Census. It also excludes people who worked in wine and grape production as a second job.

Employees comprise 90.6% of all persons employed in wine manufacturing, whilst that category comprise 82.2% across all industries and only 62.7% of employment within the grape-growing industry.

At the time of the Census, the proportion of persons working full-time in the grape-growing (71.2%) and wine manufacturing (78.0%) industries was higher than for all industries (64.6%).

LABOUR FORCE, SELECTED CHARACTERISTICS OF EMPLOYED PERSONS - 2001

	Grape-growing %	Wine manufacturing %	All industries %
Status in employment			
Employee	62.7	90.6	82.2
Employer	15.0	4.6	7.0
Own account worker	20.7	4.3	10.1
Contributing family worker	1.7	0.6	0.7
Full-time	71.2	78.0	64.6
Part-time	26.9	20.7	32.4
Not stated	1.9	1.3	3.0
Annual individual income			
Less than $15 600	21.9	11.9	17.6
$15 600-$25 999	32.7	23.2	20.6
$26 000-$51 999	33.1	47.3	41.3
$52 000 AND OVER	9.6	15.8	18.2
Not stated	2.7	1.9	2.4

Source: Census of Population and Housing, 2001.

There was a higher proportion of low income earners, (workers with an annual income of less than $15,600) in the grape-growing industry (21.9%) than in wine manufacturing (11.9%) and for all industries (17.6%). At the upper end of the income ranges, 9.6% of workers whose main job was in the grape-growing industry earned $52,000 or more compared with 15.8% in the wine manufacturing industry. Both figures are lower than that for all industries (18.2%).

Post-secondary educational qualifications were less common among workers in both the grape-growing and wine manufacturing industries than the average across all industries. Of those employed in grape-growing, 7.3% had a degree or higher compared with 15.3% in wine manufacturing and 18.7% for all industries.

The grape-growing and wine manufacturing industries have a higher male to female ratio than for all industries. Grape-growing workers tend to be older with 42.8% aged 45 years

and over compared with 32.6% of wine manufacturing workers and 34.3% for all industries.

The grape-growing and wine manufacturing industries have a higher proportion of Australian-born workers compared with all industries.

SOCIAL CHARACTERISTICS OF EMPLOYED PERSONS - 2001

	Grape-growing %	Wine manufacturing %	All industries %
Level of post-secondary qualification			
Degree or higher	7.3	15.3	18.7
Other qualification	21.9	26.9	28.0
No qualification	65.5	52.6	47.4
Inadequately described or not stated	5.4	5.1	5.9
Sex			
Males	70.3	65.8	54.8
Females	29.7	34.2	45.2
Age (years)			
15-24	14.2	14.4	16.8
25-34	19.2	27.0	23.5
35-44	23.8	25.9	25.4
45-54	23.1	21.2	22.5
55 or more	19.7	11.5	11.7
Birthplace			
Australia	81.0	83.1	74.2
Overseas main English-speaking countries	6.2	9.4	10.7
Southern Europe	3.5	1.0	1.3
Other Europe	3.9	2.3	3.8
Other	5.3	4.1	10.0

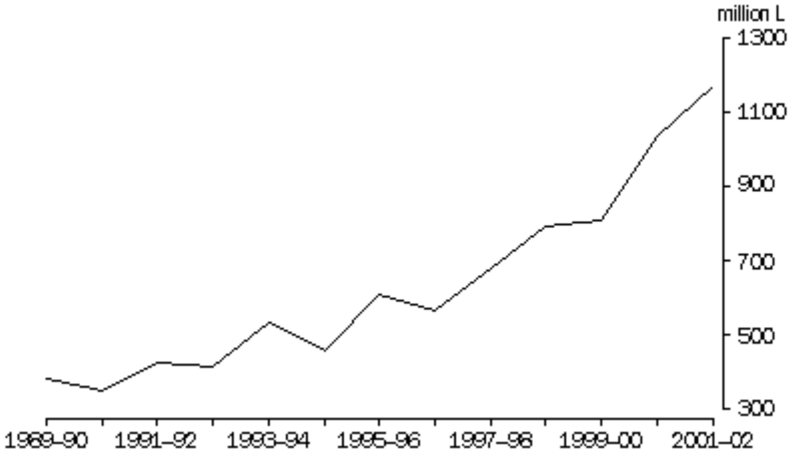
Source: Census of Population and Housing, 2001.

WINE PRODUCTION AND GRAPES CRUSHED

Winemakers who crushed in excess of 50 tonnes of grapes reported a combined total of 1,605,846 tonnes of grapes crushed in 2001–02, an increase of 12.8% or 181,896 tonnes on 2000–01. The quantity of red grapes crushed increased by 13.3% to 909,584 tonnes while white grapes crushed increased by 12.1% to 696,262 tonnes. Similar to 2000–01, the larger winemakers (those crushing more than 400 tonnes of fresh grapes) crushed 98.0% or 1,574,040 tonnes of the 2001–02 total.

For the fifth consecutive year these larger winemakers reported another record, with 1,174.1 million litres of beverage wine produced, up 13.5% on the previous record volume of 1,034.8 million litres in 2000–01. Production of unfortified wine accounted for 96.6% of the increase, up 13.2% to 1,150.9 million litres. Fortified wine production rose by 25.9% to 23.2 million litres, increasing its 1.8% share of total beverage wine production in 2000–01 to 2.0% in 2001–02.

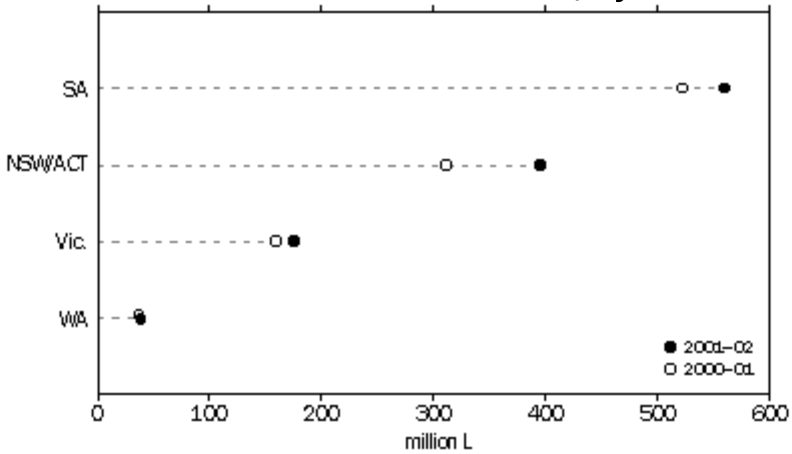
BEVERAGE WINE PRODUCTION



Source: ABS data available on request, Wine and Spirit Production Survey.

Beverage wine production in 2001–02 increased in all states except Tasmania, with the three major wine-producing states accounting for 96.5% of total production. New South Wales/Australian Capital Territory recorded the largest increase of beverage wine production in both volume and percentage terms, up 26.7% (83.5 million litres), followed by South Australia which increased by 7.2% (37.6 million litres) and Victoria up 10.5% (16.7 million litres).

BEVERAGE WINE PRODUCTION, By state

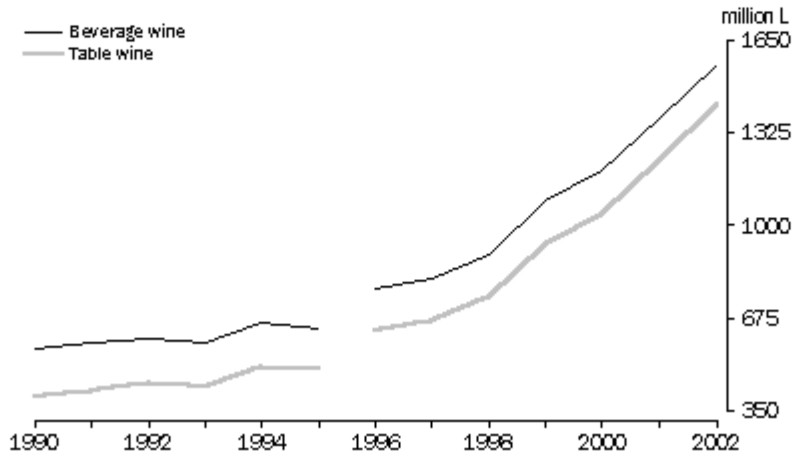


Source: ABS data available on request, Wine and Spirit Production Survey.

WINE INVENTORIES

Inventories of Australian beverage wine owned by winemakers reached another record high of 1,570.1 million litres at 30 June 2002. As with previous years, red/rosé table wine continued to dominate inventories, rising 19.9% (152.8 million litres) to 919.9 million litres and representing 58.6% of total beverage wine inventories.

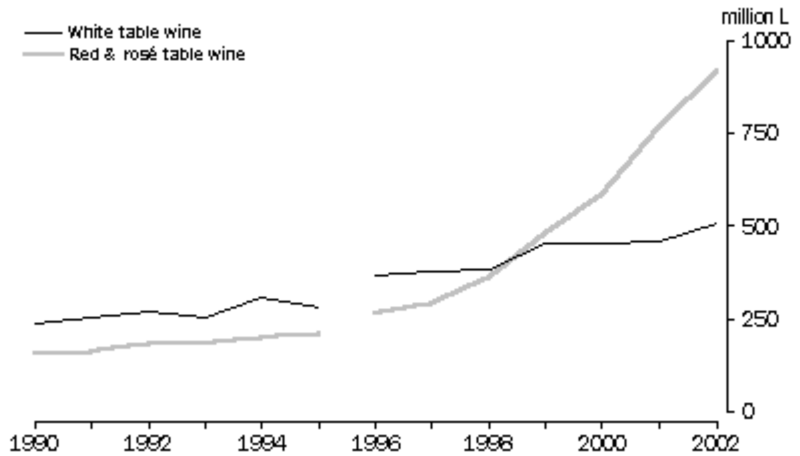
INVENTORIES OF AUSTRALIAN WINE-At 30 June(a)



(a) Break in data indicates a break in series, new definition used in 1996. See paragraph 11 of the Explanatory Notes.
Source: ABS data available on request, Inventories of Australian Wine and Brandy Survey.

Table wine inventories rose 16.4% to 1,426.5 million litres at 30 June 2002. Of all table wine inventories red/rosé table wine (64.5%), exceeded white table wine (35.5%) compared with 62.6% and 37.4% respectively at 30 June 2001.

INVENTORIES OF AUSTRALIAN TABLE WINE-At 30 June(a)



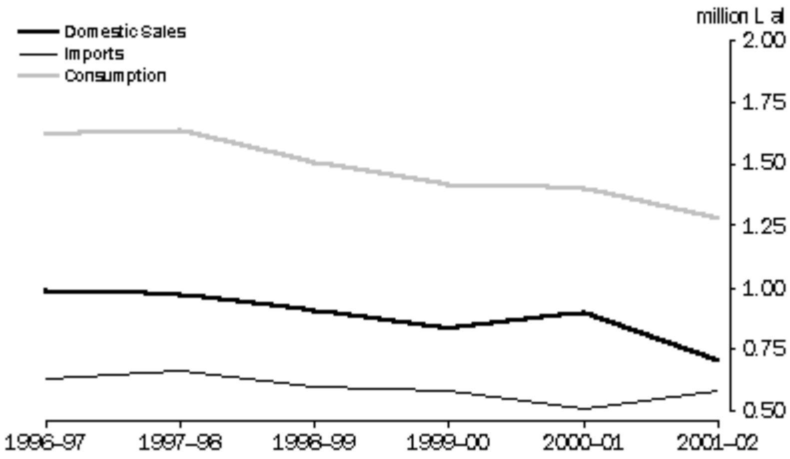
(a) Break in data indicates a break in series, new definition used in 1996. See paragraph 11 of the Explanatory Notes.
Source: ABS data available on request, Inventories of Australian Wine and Brandy Survey.

BRANDY AND GRAPE SPIRIT

In 2001–02 the production of Australian brandy decreased by 34.8% to 417,160 litres of alcohol with South Australia producing the total quantity. Brandy production has now decreased for six consecutive years, falling 61.4% overall.

A sharp fall of 22.2% in domestic sales of Australian brandy to 701,000 litres of alcohol occurred in 2001–02. This follows the increase in 2000–01 to 901,000 litres of alcohol which reversed the unbroken downward trend existing since 1980–81. Exports of Australian brandy rose 26.3% to 24,000 litres of alcohol, while the volume of imported brandy cleared for home consumption increased 14.5% to 577,000 litres of alcohol.

DOMESTIC SALES, IMPORTS AND CONSUMPTION OF BRANDY

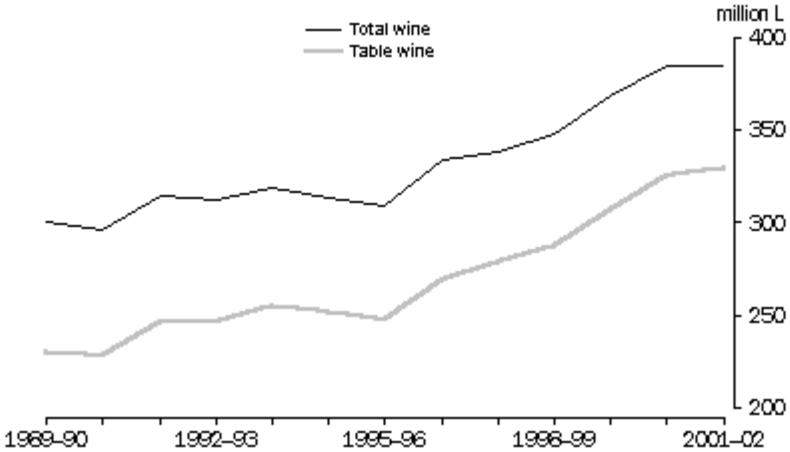


Source: Sales of Australian Wine and Brandy by Winemakers (Cat. no. 8504.0).

DOMESTIC WINE SALES

Domestic sales of Australian wine in 2001–02 were 385.3 million litres, a slight increase of 0.5 million litres on the record level of the previous year. The rise was a result of an increase in sales of red/rosé table wine (4.5 million litres) which offset the reduced sales of white table wine (down 0.3 million litres), fortified wine (down 1.8 million litres), sparkling wine (down 1.3 million litres) and other wines (down 0.8 million litres).

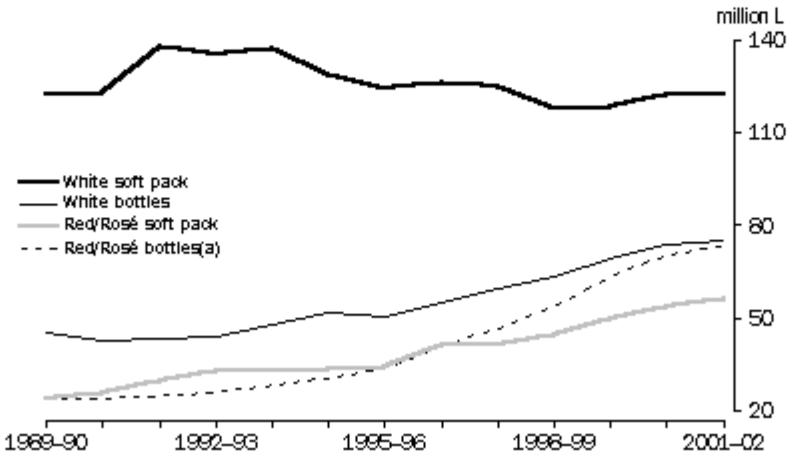
DOMESTIC SALES OF AUSTRALIAN WINE BY WINEMAKERS



Source: Sales of Australian Wine and Brandy by Winemakers (Cat. no. 8504.0).

The quantity of table wine sold in glass containers of less than two litres has increased each year since 1990–91 and represents an increasing proportion of total table wine sold. In 2001–02, 148.6 million litres of table wine was sold in glass containers less than two litres, comprising 73.3 million litres of red/rosé wine and 75.3 million litres of white wine. The amount of table wine sold in soft packs increased to 178.9 million litres, 2.9 million litres more than the previous year. Other containers accounted for 2.1 million litres, down from 4.7 million litres in 2000–01.

DOMESTIC SALES OF AUSTRALIAN RED AND WHITE TABLE WINE



Source: Sales of Australian Wine and Brandy by Winemakers (Cat. no. 8504.0).

INTERNATIONAL TRADE

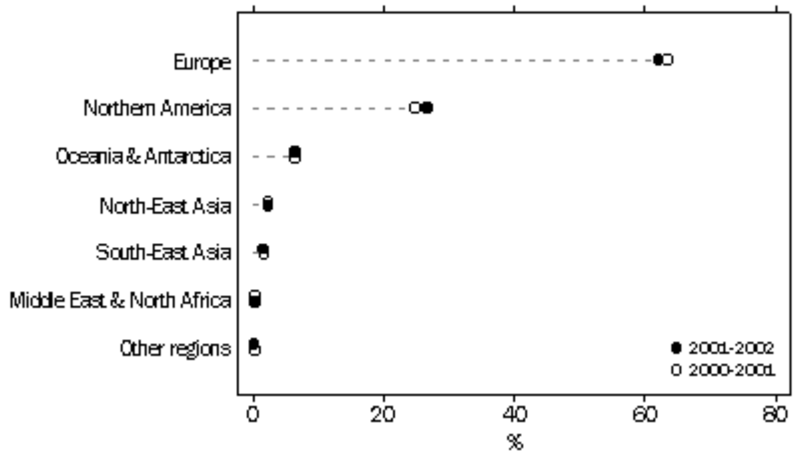
The strong growth in Australian wine exports evident since the mid-1980s continued in 2001–02 as Australia exported 418.4 million litres of wine, valued at $2,105.2m. Since 1986–87 the trade balance for wine in both quantity and value terms has consistently been in surplus (exports greater than imports), which in turn has generally been increasing over time. The record levels of wine exported in 2001–02 represented an increase of 23.7% in volume and 20.2% in value over the previous records set a year earlier.

IMPORTS OF WINE AND EXPORTS OF AUSTRALIAN WINE

Source: Sales of Australian Wine and Brandy by Winemakers (Cat. no. 8504.0).

The European Union continued to be the major regional destination for Australian wine exports in 2001–02. It accounted for 253.3 million litres (60.5% of total exports by volume), valued at $1,077.6m (51.2% of total exports by value). Exports to Northern America increased by 27.2 million litres (or 32.2%) to 111.7 million litres and were valued at $780.2m (37.1% of total exports by value). The United Kingdom was the major country of destination for Australian wine, taking 201.8 million litres, (up 23.8% from 2000–01) followed by the United States of America which received 93.1 million litres (an increase of 33.6% on the previous year).

DESTINATION OF AUSTRALIAN WINE EXPORTS-2001-02(a)

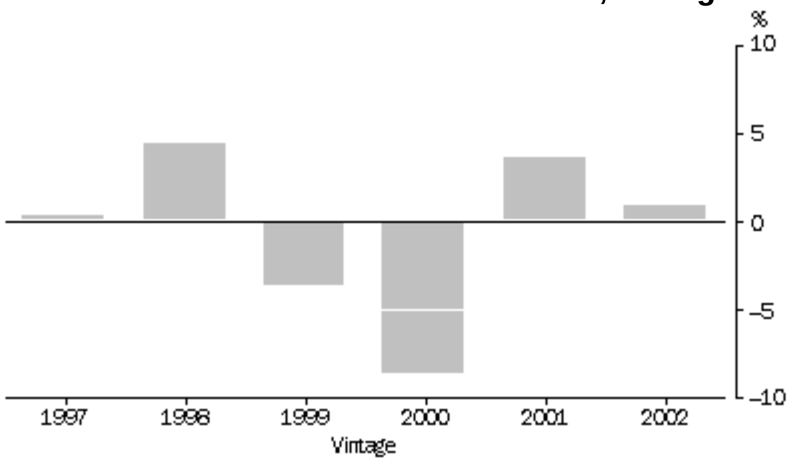


(a) Proportion of total wine exports.
Source: ABS data available on request, International Trade database.

GRAPE AND WINE PRICES

The grape price index is calculated by using the base weighted movement in prices for each of the varieties included in the survey. The index does not allow for price movements caused by a change in the mix of varieties. Movements in the prices paid for wine grapes are presented in the graph below and in table 27.

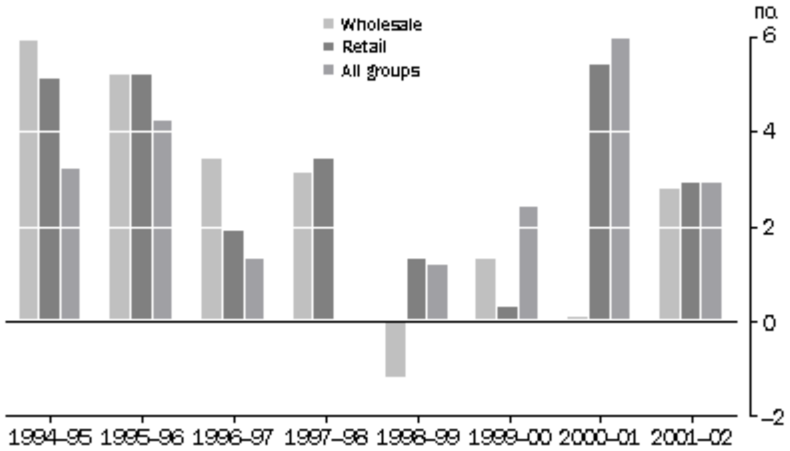
PRICE INDEX OF GRAPES USED IN WINE PRODUCTION, Change on previous vintage



Source: ABS data available on request, Price Indexes of Articles Produced by Manufacturing Industries.

The wholesale price index of total wine recorded a 2.8% increase in 2001–02, while the price received by winemakers for table wine and fortified wine recorded an increase of 2.5%. The wine group retail price index for 2001–02 increased 2.9%, equal with the general, all groups consumer price index increase.

SELECTED PRICE INDEXES, Change on previous financial year



Source: ABS data available on request, Price Indexes of Materials Used in Manufacturing Industries, Consumer Price Index.

WINE CONSUMPTION

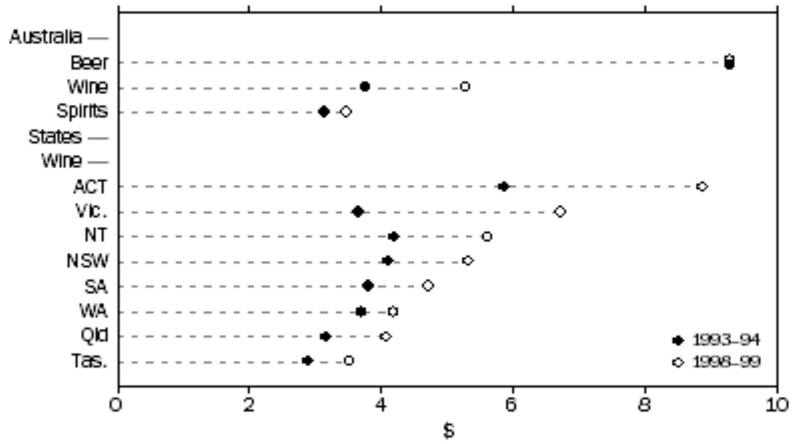
Apparent per capita consumption of wine has been relatively unchanged in recent years, with levels of 20.4 litres in 1999–2000, rising to 20.5 litres in 2000–01 and returning to 20.4 litres in 2001–02. This contrasts to the movements of the past decade and to the longer term trend which has seen per capita consumption of wine climb from levels of less than 3 litres in the late 1930s.

PER CAPITA CONSUMPTION OF WINE

Source: Sales of Australian Wine and Brandy by Winemakers (Cat. no. 8504.0).

The most current details of household expenditure show that during 1998–99 Australian households spent an average of $5.28 per week on wine. Households in the Australian Capital Territory spent the most with $8.88 and those in Tasmania the least with $3.52. Victorian households spent the highest proportion of their total weekly alcohol expenditure on wine (33%), while Northern Territory (NT) households spent the lowest (15%). From 1993–94 to 1998–99 there was a 40% increase in weekly expenditure on wine nationally.

AVERAGE WEEKLY HOUSEHOLD EXPENDITURE, Alcoholic Beverages

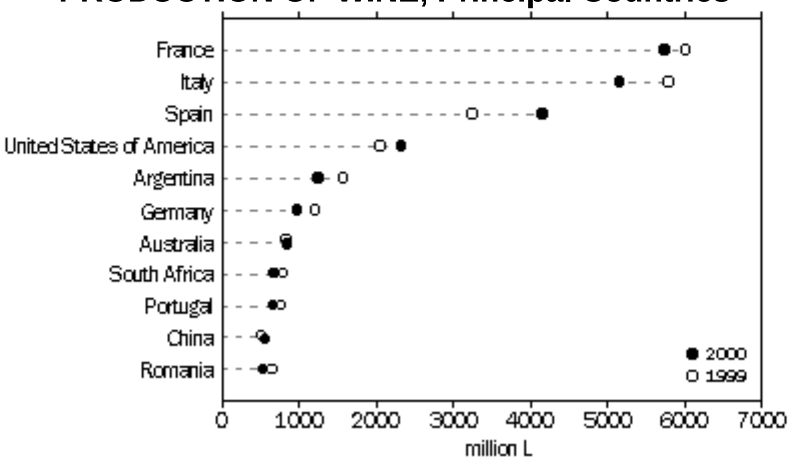


Source: Household Expenditure Survey, Australia: Detailed Expenditure Items, 1998-99 (Cat. no. 6535.0).

WORLD COMPARISONS

Of the countries for which 2000 data are available, Australia's ranking for area of vines planted (0.140 million hectares) was twelfth, a rise of four places from the previous year. Spain (1.174 million hectares) and France (0.917 million hectares) had the greatest areas under vine. Australia was ranked eleventh in terms of total grape production and seventh in terms of wine grape production. Italy and France occupied the top two rankings in both of these categories. With respect to the yield achieved, Australia was placed in seventh position with an average of 9.4 tonnes per hectare. France (5,754.1 million litres) and Italy (5,162.0 million litres) were the largest producers of wine with Australia occupying seventh placing, producing 859.2 million litres.

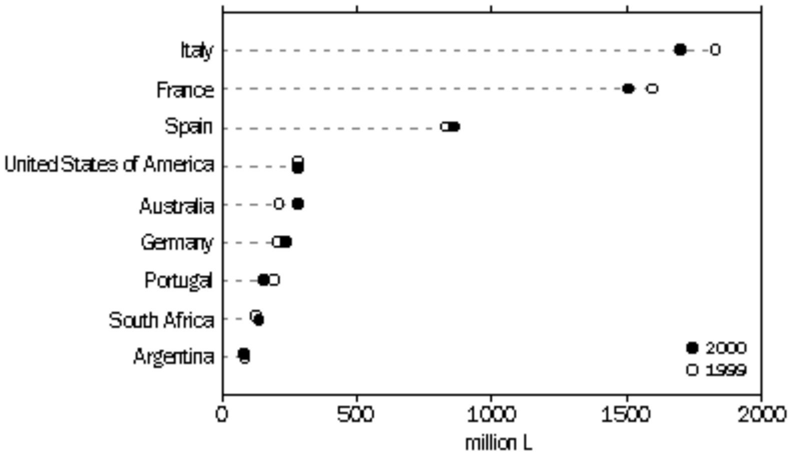
PRODUCTION OF WINE, Principal Countries



Source: Dutruc-Rosset 2002.

The countries exporting the largest volumes of wine in 2000 were Italy, France, Spain, the United States of America and Australia, accounting for 74.0% of total world wine exports. Australia exported a higher proportion of its production than any other leading exporting nation with 35.3% of production being exported (up from 25.4% in 1999). The next highest proportion was achieved by Italy with 33.0% of production. Australia's per capita consumption of wine in 2000 remained steady at 20.4 litres, well below the leading countries of France (57.0 litres), Italy (54.7 litres) and Portugal (50.2 litres).

EXPORTS OF WINE, Principal Countries



Source: Dutruc-Rosset 2002.

BIBLIOGRAPHY

Much of the ABS data used in this publication were sourced from various ABS collections. In some cases more detailed data, which were previously available on request, were used. In the list of ABS publications below, a catalogue number is quoted whenever possible to enable users to access explanatory information about various datasets. Further inquiries about these and other more detailed data, can be made either to Merv Leaker (Adelaide (08) 8237 7536) or to the contact officer named in the specific publications.

ABS PUBLICATIONS

Apparent Consumption of Foodstuffs, Australia, cat. no. 4306.0.
Consumer Price Index, Australia, cat. no. 6401.0.
Household Expenditure Survey, Australia: Detailed Expenditure Items, 1998–99, cat. no. 6535.0.
International Merchandise Trade, Australia, cat. no. 5422.0.
International Trade Price Indexes, Australia, cat. no. 6457.0.
Manufacturing Industry, Australia, cat. no. 8221.0.
Producer Price Indexes, Australia, cat. no. 6427.0.
Sales of Australian Wine and Brandy by Winemakers, cat. no. 8504.0.

ABS SURVEYS AND DATABASES

Export Price Index.
Import Price Index.
International Trade database.
Manufacturing Industry, 1999–2000.
Inventories of Australian Wine and Brandy, 30 June 2002.
Vineyards, 2002.
Wine and Spirit Production, 2001–02.
Wine Statistics, 2001–02.

NON-ABS SOURCES

Dutruc-Rosset, G., 2002, The State of Vitiviniculture in the World and the Statistical

Information in 2000, Office International de la Vigne et du Vin, Paris.

About this Release

ABOUT THIS RELEASE

Continues: 7310.0 and 8366.0

A statistical compendium of Australia's wine and grape industry containing information on: area of vines and production of grapes by region; wine production and grapes crushed by region; structure of the wine manufacturing industry; inventories of wine owned by winemakers at 30 June; brandy and grape spirit production; domestic wine sales; exports and imports of wine; price indexes of grapes and wine; consumption of wine; and world comparisons.

Explanatory Notes

Explanatory Notes

INTRODUCTION

1 This publication presents final estimates from the ABS collections: Inventories of Australian Wine and Brandy, 2001-02; Wine and Spirit Production, 2001-02; Wine Statistics, 2001-02 and Vineyards, 2002. Not all data from these collections are published here. Some further data are available for a charge, on application to the ABS.

2 This publication is a summary of statistics on grape and wine production and related activities collected by the ABS and from other sources. Some of the data used in this publication were obtained from various ABS collections for which publications with appropriate Explanatory Notes are already available. The bibliography contains a list of these publications. However, much of the data are only available in this publication and the following notes are provided to assist users.

3 The Viticulture tables replace the previous publication Viticulture, Australia (cat. no. 7310.0) and contain information on area of vines and production of red and white grapes for the 2002 season. The continuing collection of varietal data is supported by Australia's grape-growers and winemakers through their investment body, the Grape and Wine Research and Development Corporation, with matching funds from the Federal Government.

4 Differences exist between the grape production intended for winemaking reported by grape growers in the viticulture collection and the quantity of fresh grapes crushed by winemakers reported in the Wine and Spirit Production collection. Differences in the collection methodologies, as outlined below, mean some difference should always be apparent between the series.

SCOPE AND COVERAGE OF VITICULTURE SURVEY

5 Viticultural statistics relate to the year in which the harvest occurred and are derived from information obtained in a collection of all known growers.

6 Prior to the 1999 collection, an exercise was undertaken to increase the number of known growers included in the collection. The improved coverage, of over 1,000 growers, means that the data presented for 1999 and later years are not directly comparable with data for previous years.

7 The scope of the 2002 collection is based on establishments undertaking agricultural activity and having an estimated value of agricultural operations of $5,000 or more. The scope of the collection from season 1994 to season 2001 was also $5,000. Prior to the 1994 season the scope varied. Details are available on request.

8 Tasmanian data are derived from a collection undertaken by the Appellation of Origin Board under the authority of The Commissioner of Licensing. The scope of the collected data is the same as for other states.

9 Viticultural statistics are presented on an Australian Geographical Indications (GI) basis in this issue. The GI's are official descriptions of Australian wine zones, regions and sub-regions which are defined in the Australian Wine and Brandy Act. The zones and regions listed in the following table were provided to the ABS by the Australian Wine and Brandy Corporation. The list includes those regions which had been determined at the time of the Vineyards 2002 Survey and was used by the survey respondents for reference in allocating a response to a GI question on the survey form.

SCOPE AND COVERAGE OF WINE SURVEYS

10 Winemakers who crush more than 400 tonnes of grapes are included in the Wine and Spirit Production Survey. Wine production data are collected from these winemakers on a winery (location) basis to allow for state and regional data output. The grapes crushed by these wineries includes grapes owned by others and crushed on a commission or contract basis, often for wine producers who do not have their own crushing facilities. These wineries account for approximately 98% of total crushings by all winemakers crushing 50 or more tonnes of fresh grapes. Limited information on the quantity of grapes crushed and domestic wine sales are also obtained from winemakers crushing between 50 and 400 tonnes. These data are collected on a winery (location) basis in the Wine Statistics Survey. The main purpose for this supplementary collection is to establish the scope and coverage of both the main production collection and the monthly wine sales collection.

11 Details on inventories of Australian beverage wine by wine type are collected at 30 June only from winemakers with domestic wine sales of 250,000 litres or more in the previous year. Therefore, inventories owned by winemakers with lower domestic sales and who predominantly have wine export sales or who mainly undertake contract crushing are not included.

12 All inventories data are collected on an Australia-wide basis only and state figures are therefore not available. Inventories data collected from 1996 include all Australian-produced wines owned by these winemakers and held anywhere in Australia. In years previous to 1996, inventories included only those Australian-produced wines held by winemakers on any of their own premises, regardless of ownership. This change in the measurement of inventories means that data for 1996 and later are not directly comparable with earlier years.

13 The number of winemakers who fall within the scope of the wine inventories collection may vary from year to year as sales vary and individual wineries are included in, or excluded from, the wine sales collection. It is possible that inventories data may vary slightly each year as new wineries, with either large or small inventories, come into the scope of the collection. In particular, the published (i.e. closing) inventories figures for any one year may not equate with the opening inventories for the following year.

14 The wine content of products consisting of a mixture of wine and fruit juice, commonly known as ‘coolers’, is included in the appropriate wine category of the wine from which it is made, which is generally table wine.

ACKNOWLEDGMENT

15 ABS publications draw extensively on information provided freely by individuals, businesses, governments and other organisations. Their continued cooperation is very much appreciated: without it, the wide range of statistics published by the ABS would not be available. Information received by the ABS is treated in strict confidence as required by the Census and Statistics Act 1905.

ABS PUBLICATIONS

16 Current publications and other products released by the ABS are listed in the **Catalogue of Publications and Products** (cat. no. 1101.0). The Catalogue is available from any ABS office or the ABS web site. The ABS also issues a daily Release Advice on the web site which details products to be released in the week ahead.

Glossary

Beverage wine

Table, sparkling and fortified wine produced for direct consumption and not for distillation.

De-alcoholised wine

Normally fermented wine in which the alcohol has been removed and which retains all other components.

Distillation wine

Wine used for the purpose of distillation into grape spirit.

Feints and low wine

Parts of the distillate which are not usable.

Fortified wine

Wine to which grape spirit has been added, thereby adding alcoholic strength and precluding further fermentation. Fortified wine must contain at least 150 millilitres/litre and not more than 200 millilitres/litre of ethanol at 20 degrees Centigrade.

Grafted/grafting

The connection of two pieces of living plant tissue, so that they unite and grow as one plant.

Grape spirit

Alcohol spirit of vinous origin used in fortification or as a base for grape flavoured spirits.

Intended planting

The area of vines, reported on the ABS Vineyards collection form, grape growers intend to plant or graft after the current harvest, but before the next harvest.

Low alcohol wine

Wine in which the alcohol content has been deliberately reduced or wine which has been produced with a lower alcohol level using either dilution or partial fermentation.

Marc

The residue of grape skins and seeds after the juice has been extracted.

Must

Grape juice or crushed grapes in the process of becoming wine. Concentrated must is used as a sweetening agent.

Table and other grapes

This category refers to grape production that is not used for either winemaking or drying.

Unfermented grape juice

A sweet, clear, non-alcoholic liquid. Winemakers use the term to refer to must which has undergone clarification and stabilisation.

Unfortified wine

Table or sparkling wine which must contain at least 80 millilitres/litre of ethanol at 20 degrees Centigrade. Unfortified wines rely solely on fermentation for their alcoholic strength.